

**NATIONAL LIBRARY OF MEDICINE
REQUEST FOR QUOTATIONS (RFQ) NO. (RFQ-NLM 04-177/CYC)
INSTRUCTIONS, CONDITIONS, AND NOTICES TO QUOTERS
(Revised: August 12, 2004)**

A. GENERAL INFORMATION

1. NAIC CODE AND SIZE STANDARD

NOTICE TO QUOTERS: THE FOLLOWING INFORMATION IS TO BE USED IN COMPLETING BLOCK 11 OF SF 18, REQUEST FOR QUOTATIONS; AND FAR 52.219-1, SMALL BUSINESS PROGRAM REPRESENTATIONS (JANUARY 1997) OF THE ATTACHED REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFERORS OR QUOTERS (SIMPLIFIED ACQUISITIONS).

- a. The North American Industrial Classification (NAIC) code for this acquisition is 541519.
- b. The small business size standard for this acquisition is \$21 Million.
- c. This requirement is not set-aside for small business. However, the Federal Acquisition Regulation (FAR) requires in every solicitation, (except for foreign acquisitions) the inclusion of the Standard Industrial Classification (SIC) Code and corresponding size standard which best describes the nature of the requirement in the solicitation.

2. NUMBER OF AWARDS

It is anticipated that multiple awards will be made from this solicitation and that the award(s) will be made on or about September 15, 2004.

It is anticipated that the award(s) from this solicitation will be for a one (1) year period of performance.

3. COMMITMENT OF PUBLIC FUNDS

The Contracting Officer is the only individual who can legally commit the Government to the expenditure of public funds in connection with the proposed acquisition. Any other commitment, either explicit or implied, is invalid.

4. COMMUNICATIONS PRIOR TO PURCHASE ORDER AWARD

Quoters shall direct all communications to the attention of the Purchasing Agent cited in Block 5B of SF 18, Request for Quotations. Communications with other officials may compromise the competitiveness of this acquisition and result in cancellation of the requirement.

5. COMPARATIVE IMPORTANCE OF QUOTES

You are advised that paramount consideration shall be given to the evaluation of the technical portion of quotes. All evaluation factors other than cost or price, when combined, are significantly more important than cost or price. However, the Government reserves the right to make an award to the best advantage of the Government, cost and other factors considered.

6. PREPARATION COSTS

This RFQ does not commit the Government to pay for the preparation and submission of a quotation.

B. GENERAL INSTRUCTIONS TO OFFERORS

1. INSTRUCTIONS TO OFFERORS -- COMPETITIVE ACQUISITION

(a) *Definitions.* As used in this provision--

Discussions are negotiations that occur that may, at the Contracting Officer's discretion, result in the quoter being allowed to revise its quotation.

In writing or written means any worded or numbered expression which can be read, reproduced, and later communicated, and includes electronically transmitted and stored information.

Quotation modification is a change made to a quotation before the solicitation's closing date and time, or made in response to an amendment, or made to correct a mistake at any time before award.

Quotation revision is a change to a quotation made after the solicitation closing date, at the request of or as allowed by a Contracting Officer as the result of negotiations.

Time, if stated as a number of days, is calculated using calendar days, unless otherwise specified, and will include Saturdays, Sundays, and legal holidays. However, if the last day falls on a Saturday, Sunday, or legal holiday, then the period shall include the next working day.

(b) *Amendments to solicitations.* If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Quoters shall acknowledge receipt of any amendment to this solicitation by the date and time specified in the amendment(s).

(c) *Submission, modification, revision, and withdrawal of quotations.* (1) Unless other methods (e.g., electronic commerce or facsimile) are permitted in the solicitation, quotations and modifications to quotations shall be submitted in paper media in sealed envelopes or packages (i) addressed to the office specified in the solicitation, and (ii) showing the time and date specified for receipt, the solicitation number, and the name and address of the quoter. Quoters using commercial carriers should ensure that the quotation is marked on the outermost wrapper with the information in paragraphs (c)(1)(i) and (c)(1)(ii) of this provision.

(2) The first page of the quotation must show--

- (i) The solicitation number;
- (ii) The name, address, and telephone and facsimile numbers of the quoter (and electronic address if available);
- (iii) A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or

- all items upon which prices are offered at the price set opposite each item;
 - (iv) Names, titles, and telephone and facsimile numbers (and electronic addresses if available) of persons authorized to negotiate on the quoter's behalf with the Government in connection with this solicitation; and
 - (v) Name, title, and signature of person authorized to sign the quotation. Quotations signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.
- (3) *Late quotations and revisions.* (i) Any quotation received at the office designated in the solicitation after the exact time specified for receipt of quotes will not be considered unless it is received before award is made and--
 - (A) It was sent by registered or certified mail not later than the fifth calendar day before the date specified for receipt of quotations (e.g., a quotation submitted in response to a solicitation requiring receipt of offers by the 20th of the month must have been mailed by the 15th);
 - (B) It was sent by mail (or telegram or facsimile, if authorized) or hand-carried (including delivery by a commercial carrier) if it is determined by the Government that the late receipt was due primarily to Government mishandling after receipt at the Government installation;
 - (C) It was sent by U.S. Postal Service Express Mail Next Day Service-Post Office to Addressee, not later than 5:00 p.m. at the place of mailing two working days prior to the date specified for receipt of quotations. The term "working days" excludes weekends and U.S. Federal holidays;
 - (D) It was transmitted through an electronic commerce method authorized by the solicitation and was received at the initial point of entry to the Government infrastructure not later than 5:00 p.m. one working day prior to the date specified for receipt of quotations; or
 - (E) There is acceptable evidence to establish that it was received at the activity designated for receipt of quotations and was under the Government's control prior to the time set for receipt of quotations, and the Contracting Officer determines that accepting the late quotation would not unduly delay the procurement; or
 - (F) It is the only quotation received.
- (ii) Any modification or revision of a quotation or response to request for information, including any final quotation revision, is subject to the same conditions as in subparagraphs (c)(3)(i)(A) through (c)(3)(i)(E) of this provision.

- (iii) The only acceptable evidence to establish the date of mailing of a late quotation or modification or revision sent either by registered or certified mail is the U.S. or Canadian Postal Service postmark both on the envelope or wrapper and on the original receipt from the U.S. or Canadian Postal Service. Both postmarks must show a legible date or the quotation, response to a request for information, or modification or revision shall be processed as if mailed late. ``Postmark" means a printed, stamped, or otherwise placed impression (exclusive of a postage meter machine impression) that is readily identifiable without further action as having been supplied and affixed by employees of the U.S. or Canadian Postal Service on the date of mailing. Therefore, quoters or respondents should request the postal clerk to place a legible hand cancellation bull's eye postmark on both the receipt and the envelope or wrapper.
- (iv) Acceptable evidence to establish the time of receipt at the Government installation includes the time/date stamp of that installation on the quotation wrapper, other documentary evidence of receipt maintained by the installation, or oral testimony or statements of Government personnel.
- (v) The only acceptable evidence to establish the date of mailing of a late quotation, modification or revision, or withdrawal sent by Express Mail Next Day Service-Post Office to Addressee is the date entered by the post office receiving clerk on the ``Express Mail Next Day Service-Post Office to Addressee" label and the postmark on both the envelope or wrapper and on the original receipt from the U.S. Postal Service. ``Postmark" has the same meaning as defined in paragraph (c)(3)(iii) of this provision, excluding postmarks of the Canadian Postal Service. Therefore, quoters or respondents should request the postal clerk to place a legible hand cancellation bull's eye postmark on both the receipt and the envelope or wrapper.
- (vi) Notwithstanding paragraph (c)(3)(i) of this provision, a late modification or revision of an otherwise successful quotation that makes its terms more favorable to the Government will be considered at any time it is received and may be accepted.
- (vii) Quotations may be withdrawn by written notice or telegram (including mailgram) received at any time before award. If the solicitation authorizes facsimile quotations, quotations may be withdrawn via facsimile received at any time before award, subject to the conditions specified in the provision entitled "Facsimile Proposals." Quotations may be withdrawn in person by a quoter or an authorized representative, if the representative's identity is made known and the representative signs a receipt for the quotation before award.
- (viii) If an emergency or unanticipated event interrupts normal Government processes so that quotations cannot be received at the office designated for receipt of quotations by the exact time specified in the solicitation, and

urgent Government requirements preclude amendment of the solicitation or other notice of an extension of the closing date, the time specified for receipt of quotations will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal Government processes resume. If no time is specified in the solicitation, the time for receipt is 4:30 p.m., local time, for the designated Government office.

- (4) Unless otherwise specified in the solicitation, the quoter may propose to provide any item or combination of items.
 - (5) Quotations submitted in response to this solicitation shall be in English and in U.S. dollars, unless otherwise permitted by the solicitation.
 - (6) Quoters may submit modifications to their quotations at any time before the solicitation closing date and time, and may submit modifications in response to an amendment, or to correct a mistake at any time before award.
 - (7) Quoters may submit revised quotations only if requested or allowed by the Contracting Officer.
 - (8) Quotations may be withdrawn at any time before award. Withdrawals are effective upon receipt of notice by the Contracting Officer.
- (d) *Quotation expiration date.* Quotations in response to this solicitation will be valid for a period of 30 calendar days (unless a different period is proposed by the quoter).
- (e) *Restriction on disclosure and use of data.* Quoters that include in their quotations data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall--
- (1) Mark the title page with the following legend: This quotation includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed--in whole or in part--for any purpose other than to evaluate this quotation. If, however, a purchase order is awarded to this quoter as a result of--or in connection with-- the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting purchase order. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]; and
 - (2) Mark each sheet of data it wishes to restrict with the following legend: Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this quotation.
- (f) *Purchase order award.* (1) The Government intends to award a purchase order or purchase orders resulting from this solicitation to the responsible quoter(s) whose

quotation(s) represents the best value after evaluation in accordance with the factors and subfactors in the solicitation.

- (2) The Government may reject any or all quotations if such action is in the Government's interest.
- (3) The Government may waive informalities and minor irregularities in quotations received.
- (4) The Government shall evaluate quotations and may award a purchase order without discussions with quoters (except clarifications as described in FAR 15.306(a)). Therefore, the quoter's initial quotation should contain the quoter's best terms from a cost or price and technical standpoint. The Government reserves the right to conduct discussions if the Contracting Officer later determines them to be necessary.
- (5) The Government reserves the right to make an award on any item for a quantity less than the quantity quoted, at the unit cost or prices quoted, unless the quoter specifies otherwise in the quotation.
- (6) The Government reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the Government's best interest to do so.
- (7) Exchanges with quoters after receipt of a quotation do not constitute a rejection or counteroffer by the Government.
- (8) The Government may determine that a quotation is unacceptable if the prices proposed are materially unbalanced between line items or subline items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A quotation may be rejected if the Contracting Officer determines that the lack of balance poses an unacceptable risk to the Government.
- (9) If a cost realism analysis is performed, cost realism may be considered by the source selection authority in evaluating performance or schedule risk.

2. POTENTIAL AWARD WITHOUT DISCUSSIONS

The Government reserves the right to award a purchase order without discussions if the Contracting Officer determines that the initial prices are fair and reasonable and that discussions are not necessary.

3. ORDERING TERMS AND CONDITIONS

- C The quoter must specify the unit price quoted for each Item Number listed in Block 12(b) of SF 18.
- C Prices quoted for this RFQ are Open Market or General Services Administration (GSA) Federal Supply Schedule (FSS) prices. For items quoted from the FSS, the quoter must

cite its FSS contract number. The quoter must also provide a copy of its FSS contractor's price list with its quote.

- C The quoter must indicate the Quantity, Item, and Trade Discounts being quoted for each line item listed in Block 12(b) of the SF 18. If none, so state.
- C The quoter must indicate a period of delivery, citing the number of days after receipt of a purchase order document in which delivery will be performed.
- C The quoter must indicate the F.O.B. Point (cite 'O' for Origin and 'D' for Destination). [Reference Item No. 2, Transportation & Shipping Terms, of the attached Addendum to Terms and Conditions of Purchase Order.]

4. PURCHASE ORDER TERMS AND CONDITIONS

The attached Purchase Order Terms and Conditions shall be made a part of any purchase order awarded as a result of this RFQ.

The attached Addendum to Terms and Conditions of Purchase Order shall be made a part of any purchase order awarded as a result of this RFQ.

5. REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFERORS OR QUOTERS (SIMPLIFIED ACQUISITIONS)

- (a). The attached Representations, Certifications, and Other Statements of Offerors or Quoters (Simplified Acquisitions) shall be completed and submitted as part of the quotation.
- (b). EXEMPTION FROM APPLICATION OF SERVICE CONTRACT ACT PROVISIONS FOR PURCHASE ORDERS FOR MAINTENANCE, CALIBRATION, AND/OR REPAIR OF CERTAIN INFORMATION TECHNOLOGY, SCIENTIFIC AND MEDICAL AND/OR OFFICE AND BUSINESS EQUIPMENT -- QUOTER CERTIFICATION [FAR 52.222-48 (AUGUST 1996)]

The Quoter must complete the following certification and return it with its offer.

- a. The following certification shall be checked:

CERTIFICATION

The quoter certifies [] / does not certify [] that--

- (1) The items of equipment to be serviced under this purchase order are commercial items which are used regularly for other than Government purposes, and are sold or traded by the quoter in substantial quantities to the general public in the course of normal business operations;
- (2) The purchase order services are furnished at prices which are, or are based on, established catalog or market prices for the maintenance, calibration, and/or repair of certain information technology, scientific and medical and/or office and business equipment. An "established catalog price" is a price "including discount price" recorded in a catalog, price list,

schedule, or other verifiable and established record that is regularly maintained by the manufacturer or the quoter and is either published or otherwise available for inspection by customers. An "established market price" is a current price, established in the course of ordinary and usual trade between buyers and sellers free to bargain, which can be substantiated by data from sources independent of the manufacturer or quoter; and (3) The quoter utilizes the same compensation (wage and fringe benefits) plan for all service employees performing work under the purchase order as the quoter uses for equivalent employees servicing the same equipment of commercial customers.

- b. If a negative certification is made and a Service Contract Act wage determination is not attached to the solicitation, the quoter shall notify the Contracting Officer as soon as possible.
- c. Failure to execute the certification in Paragraph A of this clause or to contact the Contracting Officer as required in paragraph b of this clause may render the quote nonresponsive.

Quoter's Name: _____ Title:

Signature: _____ Date:

6. PRIVACY ACT

The Privacy Act of 1974 (P.L. 93-579) requires that a Federal agency advise each individual whom it asks to supply information, the authority which authorizes the solicitation, whether disclosure is voluntary or mandatory, the principal purpose for which the information is intended to be used, the uses outside the agency which may be made of the information, and the effects on the individual, if any, of not providing all or any part of the requested information.

The NIH is requesting the information called for in this RFQ pursuant to the authority provided by Sec. 301(a)(7) of the Public Health Service Act, as amended, and P.L. 92-218, as amended.

Providing the information requested is entirely voluntary. The collection of this information is for the purpose of conducting an accurate, fair, and adequate review prior to a discussion as to whether to award a purchase order.

Failure to provide any or all of the requested information may result in a less than adequate review.

In addition, the Privacy Act of 1974 (P.L. 93-579, Section 7) requires that the following information be provided when individuals are requested to disclose their social security number.

Provision of the social security number is voluntary. Social security numbers are requested for the purpose of accurate and efficient identification, referral, review and management of NIH acquisition programs. Authority for requesting this information is provided by Section 301 and Title IV of the PHS Act, as amended.

The information provided by you may be routinely disclosed for the following purposes:

- C to the cognizant audit agency and the General Accounting Office for auditing.
- C to the Department of Justice as required for litigation.
- C to respond to congressional inquiries.
- C to qualified experts, not within the definition of Department employees, for opinions as a part of the review process.

7. **SELECTION OF OFFEROR**

- a. The acceptability of the technical portion of each quotation will be evaluated by a technical review committee or a member of the Government's technical staff. Each quotation will be evaluated in strict conformity with the evaluation criteria in the RFQ utilizing point scores and written critiques. The quoter may be requested to submit clarifying information.
- b. The business portion of each quotation will be subjected to a cost/price analysis (as appropriate), management analysis, etc.
- c. If award will be made without conducting discussions, quoters may be given the opportunity to clarify certain aspects of their quotations (e.g., the relevance of a quoter's past performance information and adverse past performance information to which the quoter has not previously had an opportunity to respond) or to resolve minor or clerical errors.
- d. Best-Value Analysis. A final best-value analysis will be performed taking into consideration the results of the technical evaluation, cost analysis, and ability to complete the work within the Government's required schedule. The Government reserves the right to make an award to the best advantage of the Government, technical merit, cost, and other factors considered.
- e. The NLM reserves the right to make a single award, multiple awards, or no award at all as a result of this RFQ. In addition, the RFQ may be amended or canceled as necessary to meet NLM's requirements.

8. **SOLICITATION PROVISIONS INCORPORATED BY REFERENCE [FAR 52.252-1 (FEBRUARY 1998)].**

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The quoter is cautioned that the listed provisions may include blocks that must be completed by the quoter and submitted with its quotation. In lieu of submitting the full text provisions, the quoter may identify the provision by paragraph identifier and provide the appropriate information with its quotation. Also, the full text of a solicitation provision may be accessed electronically at this address: <http://www.arnet.gov/far/>.

FEDERAL ACQUISITION REGULATION (48CFR CHAPTER 1):

- a. Submission of Offers in the English Language, FAR 52.214-34 (April 1991).
- b. Submission of Offers in U.S. Currency, FAR 52.214-35 (April 1991).

9. NUMBER OF COPIES OF QUOTATION

Your quotation shall be organized as specified in Section B., GENERAL INSTRUCTIONS TO OFFERORS; Section C., INSTRUCTIONS FOR PREPARING THE TECHNICAL PORTION OF THE QUOTATION; and Section D., INSTRUCTIONS FOR PREPARING THE BUSINESS PORTION OF THE QUOTATION; and must submit an electronic PDF format copy via email to Cara Y. Calimano at cc436e@nih.gov by the closing date and 1 original copy to the address shown in Block 5A of the Standard Form 18.

C. INSTRUCTIONS FOR PREPARING THE TECHNICAL PORTION OF THE QUOTATION

1. PREPARING THE TECHNICAL PORTION OF THE QUOTATION

A detailed work plan must be submitted indicating how each aspect of the statement of work is to be accomplished. Your technical approach should be in as much detail as you consider necessary to fully explain your proposed technical approach or method. The technical portion of your quotation should reflect a clear understanding of the nature of the work being undertaken. The technical portion of the quotation must include information on how the project is to be organized, staffed, and managed. Information should be provided which will demonstrate your understanding and management of important events or tasks.

Quotation responses are expected to be brief -- approximately 5 pages in length. Any additional information may not exceed 10 pages. Documents totally over 15 pages will not be reviewed.

Technical Discussions. The technical discussion included in the technical portion of your quotation should respond to the items set forth below:

a. Statement of Work

- (1). Objectives. State the overall objectives and the specific accomplishments you hope to achieve. Indicate the rationale for your plan, and relationship to comparable work in progress elsewhere. Review pertinent work already published which is relevant to this project and your proposed approach. This should support the scope of the project as you perceive it.
- (2). Approach. Outline the general plan of work. Discuss phasing and, if appropriate, include the design and possible or probable outcome of approaches offered.
- (3). Methods. Describe in detail the methodologies you will use for the project, indicating your level of experience with each, areas of anticipated difficulties, and any unusual expenses you anticipate.
- (4). Schedule. Provide a schedule for completion of the work and delivery of items

specified in the statement of work. Performance or delivery schedules shall be indicated for phases or segments, as applicable, as well as for the overall program. Schedules shall be shown in terms of calendar months from the date of authorization to proceed or, where applicable, from the date of a stated event, as for example, receipt of a required approval by the Contracting Officer. Unless the RFQ indicates that the stipulated schedules are mandatory, they shall be treated as desired or recommended schedules. In this event, quotations based upon the quoter's best alternative schedule, involving no overtime, extra shift or other premium, will be accepted for consideration.

- b. Personnel. Describe the experience and qualifications of personnel who will be assigned for direct work on this project. Information is required which will show the composition of the task or work group, its general qualifications, and recent experience with similar equipment or programs.

2. EVALUATION OF THE TECHNICAL PORTION OF QUOTATIONS

The technical portion of quotations will be evaluated in accordance with the factors, weights, and order of relative importance as described in E. EVALUATION FACTORS FOR AWARD below.

3. ADDITIONAL INSTRUCTIONS FOR PREPARING THE TECHNICAL PORTION OF THE QUOTATION

- a. Quotations which merely offer to conduct the work in accordance with the requirements of the Government's scope of work will not be eligible for award. The quoter must submit an explanation of the proposed technical approach in conjunction with the tasks to be performed in achieving the project objectives.
- b. Evaluation of the technical portion of quotations will be conducted by a technical review committee or a member of the Government's technical staff in accordance with the weighted technical evaluation criteria stated in E. EVALUATION FACTORS FOR AWARD below. This evaluation produces a numerical score (points) which is based upon the information contained in the quoter's quotation only.

D. INSTRUCTIONS FOR PREPARING THE BUSINESS PORTION OF THE QUOTATION

1. BASIC COST/PRICE INFORMATION

Quoters shall submit a detailed breakdown of estimated costs by tasks to be performed and number of hours required to complete each task. In addition, a summary total amount shall be furnished for the entire project.

The business portion of the quotation should provide, as appropriate, a breakdown by cost element for each line item in Block 12(b) of the SF 18, such as direct labor, materials, subcontracted items, and other direct costs.

The business portion of the quotation must contain sufficient information to allow the Government to perform a basic analysis of the proposed cost or price of the work. This

information shall include the amounts of the basic elements of the proposed cost or price. These elements will include, as appropriate, direct labor, fringe benefits, travel, materials, subcontracts, purchased parts, shipping, indirect costs and rate, fee, and profit.

2. INFORMATION OTHER THAN COST OR PRICING DATA

The information submitted shall consist of data to permit the Contracting Officer and authorized representatives to determine price reasonableness or cost realism, e.g., information to support an analysis of material costs (when sufficient information on labor and overhead rates is already available), or information on prices and quantities at which the quoter has previously sold the same or similar items.

Any information submitted must support the price proposed. Include sufficient detail or cross reference to clearly establish the relationship of the information provided to the price proposed. Support any information provided by explanations or supporting rational as needed to permit the Contracting Officer and authorized representatives to evaluate the documentation.

Unless otherwise stated in this solicitation, the information may be submitted in the quoter's own format.

3. QUALIFICATIONS OF THE QUOTER

You are requested to submit a summary of your General Experience, Organizational Experience Related to this RFQ, Performance History, and Pertinent Acquisitions.

- a. General Experience: defined as general background, experience and qualifications of the quoter. A discussion of the quoter's facilities which can be devoted to the project may be appropriate.
- b. Organizational Experience Related to this RFQ: defined as the accomplishment of work, either past or on-going, which is comparable or related to the effort required by this RFQ. This includes the quoter's overall experience, but not the experience and/or past performance of individuals who are included in the quotation as personnel involved with the Statement of Work in this RFQ.
- c. Performance History: defined as meeting acquisition objectives within delivery and cost schedules on efforts, either past or on-going, which is comparable or related to the effort required by this RFQ.
- d. Pertinent Acquisitions: defined as a listing of each related acquisition completed within the last three years or currently in process. The listing should include: (1) the acquisition number; (2) acquiring agency; (3) acquisition dollar value; (4) dates acquisition began and ended (or ends); (5) description of acquisition work; (6) explanation of relevance of work to this RFQ; and (7) actual delivery and cost performance versus delivery and cost agree to in the acquisition(s).

You are cautioned that omission or an inadequate or inaccurate response to this very important RFQ requirement could have a negative effect on the overall selection process. Previous work

experience which is relevant to the ability of the quoter to perform will be considered in the source selection process.

4. PRICING

Prices to the Government shall be as low or lower than those charged to the quoter's most favored customer for comparable quantities under similar terms and conditions in addition to any trade or prompt payment discounts offered. Accordingly, discounts notwithstanding, the quoter must ensure that the items sold to the Government in the particular commodity category meet the requirement for "most favorable pricing" to the Government.

5. PROVISION OF LIST PRICES

In order for NLM to calculate dollar savings, the quoter shall provide NLM with the published commercial list price of each item identified in the RFQ.

E. EVALUATION FACTORS FOR AWARD

1. GENERAL

The major evaluation factors for this RFQ include technical (which encompasses the quoter's previous work experience) and cost/price factors. Although technical factors are of paramount consideration in the award of a purchase order(s), cost/price is also important to the overall award decision. All evaluation factors other than cost or price, when combined, are significantly more important than cost or price.

Quoters are advised that award will be made to that the source whose quote provides the best overall value to the Government.

2. MANDATORY QUALIFICATION CRITERIA

Listed below are mandatory qualification criteria. The qualification criteria establish conditions that must be met in order for your quote to be considered for award.

- a. Algorithm validation data collection and data processing (with a focus on time-varying data applications such as longitudinal data collections on chronic, degenerative diseases) as well as tools for managing public data collections, and/or
- b. Contract programming that extends ITK through incorporating additional algorithm families not already represented in ITK or projects that incorporate ITK into software and hardware systems in support of clinical applications (with an emphasis on multidisciplinary, multi-scale, practical applications).

Project proposals must be submitted as algorithms to be included in ITK and must comply with style, documentation, and coding conventions for Insight software, or the software deliverable must adapt ITK or its software engineering components to be part of the foundation of public data processing services or products.

The quoter shall include all information which documents and/or supports the qualification criteria in one clearly marked section of its quotation.

3. BRAND NAME OR EQUAL

If items called for by this RFQ have been identified by a "Brand Name or Equal" description, such identification is to indicate the quality and characteristics of products that will be satisfactory. Quotes offering "equal" products will be considered for award if such products are clearly identified in the quote and are determined by the Government to be equal in all material aspects to the brand name products referenced in the RFQ.

Unless the quoter clearly indicates in its quote that it is quoting an "equal" product, its quote shall be considered as quoting the brand name product referenced in the RFQ.

If the quoter proposes to furnish an "equal" product, the brand name, if any, of the product to be furnished shall be clearly identified in the quote. The evaluation of quotes and the determination as to equality of the product quoted shall be the responsibility of the Government and will be based on information furnished by the quoter or identified in its quote as well as other information reasonably available to the purchasing activity.

CAUTION TO QUOTERS. The purchasing activity is not responsible for locating or securing any information which is not identified in the quote and reasonably available to the purchasing activity. Accordingly, to insure that sufficient information is available, the quoter must furnish as a part of its quote all descriptive material (such as cuts, illustrations, drawings, or other information) necessary for the purchasing activity to:

- (a) Determine whether the product quoted meets the requirements of the RFQ, and
- (b) Establish exactly what is being quoted to furnish and what the Government would be binding itself to purchase by making an award.

The information furnished may include specific references to information previously furnished or to information otherwise available to the purchasing activity.

If the quote involves modifying a product so as to make it conform to the requirements of the RFQ, the quote shall:

- (i) include a clear description of such modifications and,
- (ii) clearly mark any descriptive material to show the modifications.

Modifications submitted after the date specified for receipt of quotes which involve making a product conform to a brand name product referenced in the RFQ will not be considered.

A quoter which merely ascertains that its products meet the brand name specifications will not be considered for award.

4. EVALUATION OF OPTIONS

It is anticipated that any purchase order(s) awarded from this RFQ will contain option provision(s) and period(s).

In accordance with FAR Clause 52.217-5, Evaluation of Options (July 1990), the Government will evaluate quotes for award purposes by adding the total price for all options to the total price for the basic requirement, except when it is determined in accordance with FAR 17.206(b) not to be in the Government's best interests. Evaluation of options will not obligate the Government to exercise the option(s).

5. TECHNICAL EVALUATION CRITERIA

The following technical evaluation criteria will be used by the Government when reviewing the technical portion of the quotation. The criteria below are listed in the order of relative importance with weights assigned for evaluation purposes.

Criterion A

Weight = 20 points

Qualifications and Availability of Proposed Personnel

Demonstrated evidence of the qualifications, experience, and availability of professional and technical personnel comprising the necessary project staff.

The proposal must demonstrate and document the relevant expertise, education, availability, and experience of the proposed personnel to be assigned and available for work under the project. Specifically, the proposal must demonstrate and document:

- (a) Background expertise — the extent to which the key personnel and the project team as a whole have access to the range of educational backgrounds needed for implementing a project in the proposed area.
- (b) Experience and expertise — the extent to which the key personnel and the project team include significant experience and expertise in the specific fields required for the applications area proposed.

Qualifications **may** include:

- 1) Demonstrated experience with segmentation and registration methods.
- 2) Experience programming C++ and in object oriented software design.
- 3) Experience in advanced software engineering techniques.
- 4) Experience in volume data collection and data analysis for clinical applications and algorithm validation.
- 5) Evidence of expertise, demonstrated through publication of algorithms, methods, or software systems, through projects in areas such as:
 - Algorithms or families of methods not currently represented in ITK
 - haptic visualization and segmentation assistance using ITK

- A dashboard for 3D tumor evaluation, comparison, and validation (for example, a regression testing system for comparing ITK algorithms against manual tumor evaluations) providing regression testing and comparison of publicly submitted algorithms
- A segmentation and visualization workstation for diffusion tensor imaging (DTI) MRI data (T1, PD, and DTI echo sequences).
- Multiscale genome to physiological expression segmentation and visualization with ITK support.
- Fast interaction techniques for low-latency visualization and segmentation navigation with ITK
- Inner and middle ear modeling and segmentation including mechanical and electro-physiology simulation
- Public data storage and deposition libraries and their supporting tools and infrastructure
- Heart modeling
- Tools for interpolating development and growth using time-varying data
- A complete open-source DICOM implementation in ITK (DICOM Store-forward, query-retrieve, etc.)
- A tumor volume measurement workstation with ITK plug-in capabilities
- ITK supportable software for creating PACS research archives with automatic scrubbing and de-identification of patient information across PACS vendors.

Criterion B

Weight = 40 points

Understanding the Requirement and Technical Approach

Scientific, technical, or analytical approach to achieve project objectives, including a demonstrated understanding of potential problems.

The proposal must demonstrate a thorough understanding of the requirements of the Statement of Objectives and Research Requirements and describes an approach that will demonstrate the achievement of timely and acceptable performance. The proposal presents a comprehensive statement of the problem, scope, and purpose of the project to demonstrate an understanding of the requirements from a management and technical standpoint.

The proposal should describe: (1) a pre-existing algorithm or set of algorithms to be added to ITK;

OR

(2) a collection of relevant data and the analysis of that data to be added to the test and

validation collection in ITK;

OR

(3) documented development of a pre-existing software system such as software for medical visualization, simulation, or treatment planning. The proposal should describe how ITK and the software system should be integrated.

Specifically the proposal must demonstrate:

- (a) Relevance of the proposed application area to the specific areas of interest outlined in the Statement of Objectives and Research Requirements, including the emphasis of the solicitation on 3D (or higher dimensional) algorithms or data suitable for algorithm validation.
- (b) The importance of the proposed application area, that is, the potential for its use as part of the Visible Human Project Insight Toolkit. Importance will be judged on the contribution of the datasets, the algorithms, or system interfaces to the broadening of the community of ITK users. Classes of algorithms that are already represented in ITK will be scored lower than methods that are not currently covered by the toolkit. Importance of data collections will be evaluated on the breadth of the datasets proposed for distribution with ITK, the number of datasets and relevance of that data to the medical community. Comprehensive data collections will be preferred over single, unique, specialty datasets. Proposed system interfaces to software products will be evaluated on the perceived impact of ITK on that system, and the relative benefit to the Insight project. Interfacing ITK to software packages with established user communities will help amplify the contribution of the Insight project among researchers in medical image analysis. Proposals should describe the expected impact of their contribution both to the intended user group, and the concomitant benefit to the Visible Human Project Insight Toolkit.
- (c) The demonstrated level of understanding of the image understanding issues and problems related to the proposed application as they pertain to the analysis and processing of medical images.
- (d) The demonstrated level of understanding of the software development issues and problems associated with distributed code development among a consortium of programming teams; **OR** a demonstrated level of understanding of the data distribution issues and problems associated with the dissemination of medical data including privacy protection, licensing, copyright protection, and patient consent.

The uniqueness of the proposed work and how it differs from methods, techniques, and/or tools already available as part of the Visible Human Project Insight Toolkit

Criterion C

Weight = 20 points

Institutional Experience/Commitment

The proposal must demonstrate and document:

- (a) The extent of successful experience of the proposing organization with the design, development, and implementation of complex advanced medical image processing technologies. This experience should be demonstrated in the form of documented development of (1) a pre-existing algorithm or set of algorithms to be contributed to ITK;

OR

- (2) a collection of relevant data and the analysis of that data to be added to the test and validation modules of ITK;

OR

- (3) documented development of a pre-existing software system such as software for medical visualization, simulation, or treatment planning. The proposal should describe how ITK and the software system should be integrated.

- (b) The degree of commitment of the various entities involved in the proposed software development process as evidenced by documentation included in the proposal.
- (c) The degree of commitment of the various entities involved in the proposed software development process and the commitment to distributing the product code and related deliverables in source-code form.

Criterion D

Weight = 10 points

**Proposed Facilities and Equipment
Availability and proposed utilization.**

The contractor should have a demonstrated ongoing active research interest and an in-house program in clinical or biomedical information processing or the use of medical computing in health services research. This requirement is necessary to ensure the contractor has the established background and knowledge required to make practical advances in these complex areas of research. NLM wishes to establish relationships with institutions or organizations that have independent/complementary research interests to ensure continued development towards the eventual goal of comprehensive algorithm coverage in ITK. The contractor should also have access to members of the principal user groups for which ITK is intended (i.e., computer software designers and toolbuilders for health sciences practitioners, educators, health services researchers, biomedical researchers) who can be used to test the effectiveness of the structures and models developed.

The proposal must describe the availability and proposed utilization of appropriate facilities and equipment required to successfully perform work in the proposed application area. This includes access to source data and validation instrumentation.

Criterion E

Weight = 10 points

Proposal Clarity and Conformance

All proposals must be succinct and clear in order to effectively communicate the information necessary for the technical evaluation. Proposals not complying with the requirements of the request will not be considered. The technical evaluation will grade the clarity, brevity, and effectiveness within the limit of five pages.

Proposals should be self-contained. Those that force the reviewer to refer to external sources of information may be considered less competitive.

TOTAL POSSIBLE POINTS

100

F. ATTACHMENTS TO THE RFQ

- A. Purchase Order Terms and Conditions (**4 pages**).

- B. Addendum to Terms and Conditions of Purchase Order (**4 pages**).
- C. Representations, Certifications, and Other Statements of Offerors or Quoters (Simplified Acquisitions) (**5 pages**).
- D. Statement of Work (**5 pages**).